



SANDATA ELECTRONIC VISIT VERIFICATION (EVV): SECURITY (USER SET-UP)

OBJECTIVES



After completing this lesson, you will be able to:

- ◆ define key terminology;
- ◆ access the security module;
- ◆ create and manage users
- ◆ create and manage user roles; and
- ◆ change your password.

KEY TERMINOLOGY

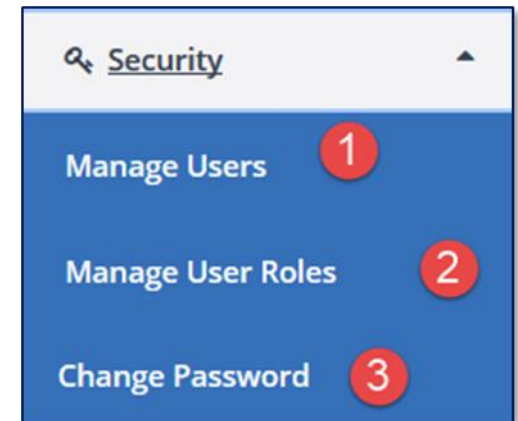
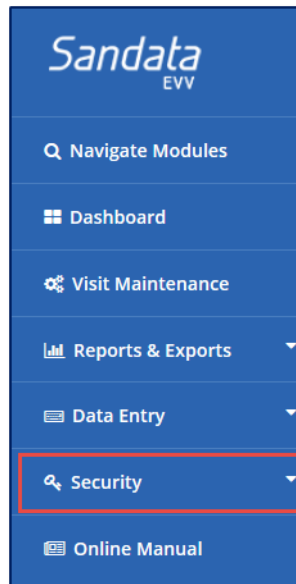
Term	Definition
Administrator	The person at the agency with the ability to create new users, assign roles, system privileges and reset passwords.
Client	A person who receives services through the Medicaid program.
Privilege	A single permission.
Role	A group of privileges (permissions) assigned to the user which allows the user to perform visit activities in Sandata EVV.
Security	The module in Sandata EVV where users (office staff) are set up to use the system.
User	A person with a unique login and password to Sandata EVV.
Username	The user's email address.

SECURITY SETTINGS: ACCESS

◆ Click Security from the main navigation panel.

- Expands to display 3 sections of security settings

1. **Manage Users** – allows the user to create and maintain users.
2. **Manage User Roles** – allows the system administrator to group privileges and assign them to users of the EVV system
3. **Change Password** – allows the logged in user to change their own password

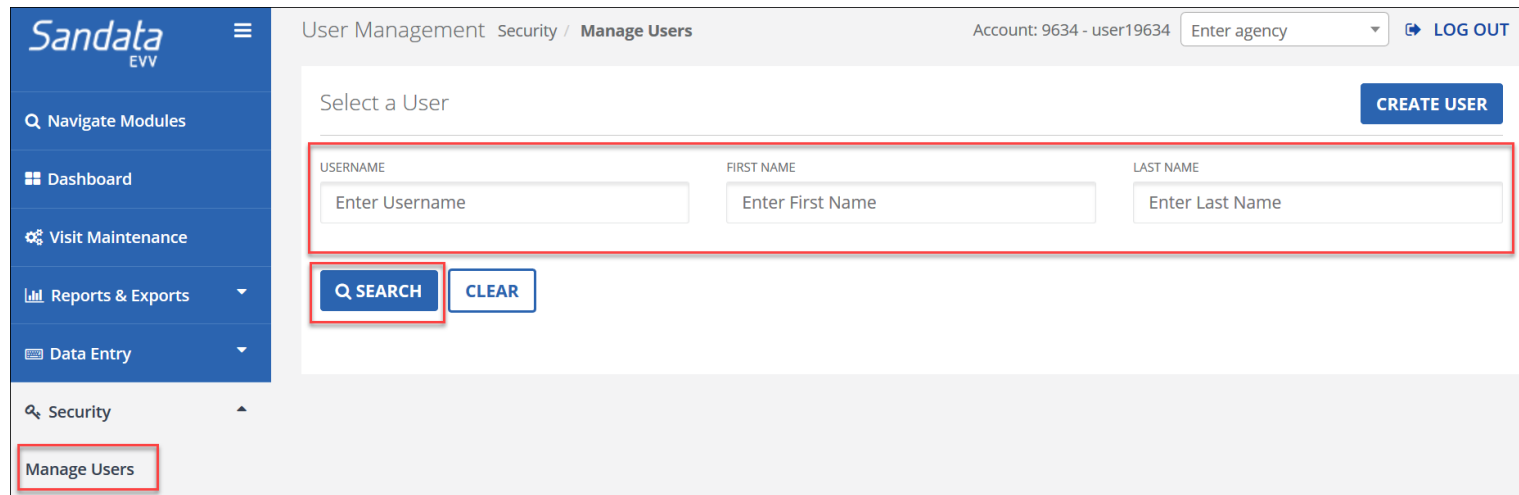





SEARCHING FOR USERS

SEARCHING FOR USERS

1. Click **SECURITY > MANAGE USERS**
2. Input the appropriate criteria (user name, first name or their last name) in the appropriate fields to filter the results.
3. Press **<Enter>** (on the keyboard) or click **SEARCH**.



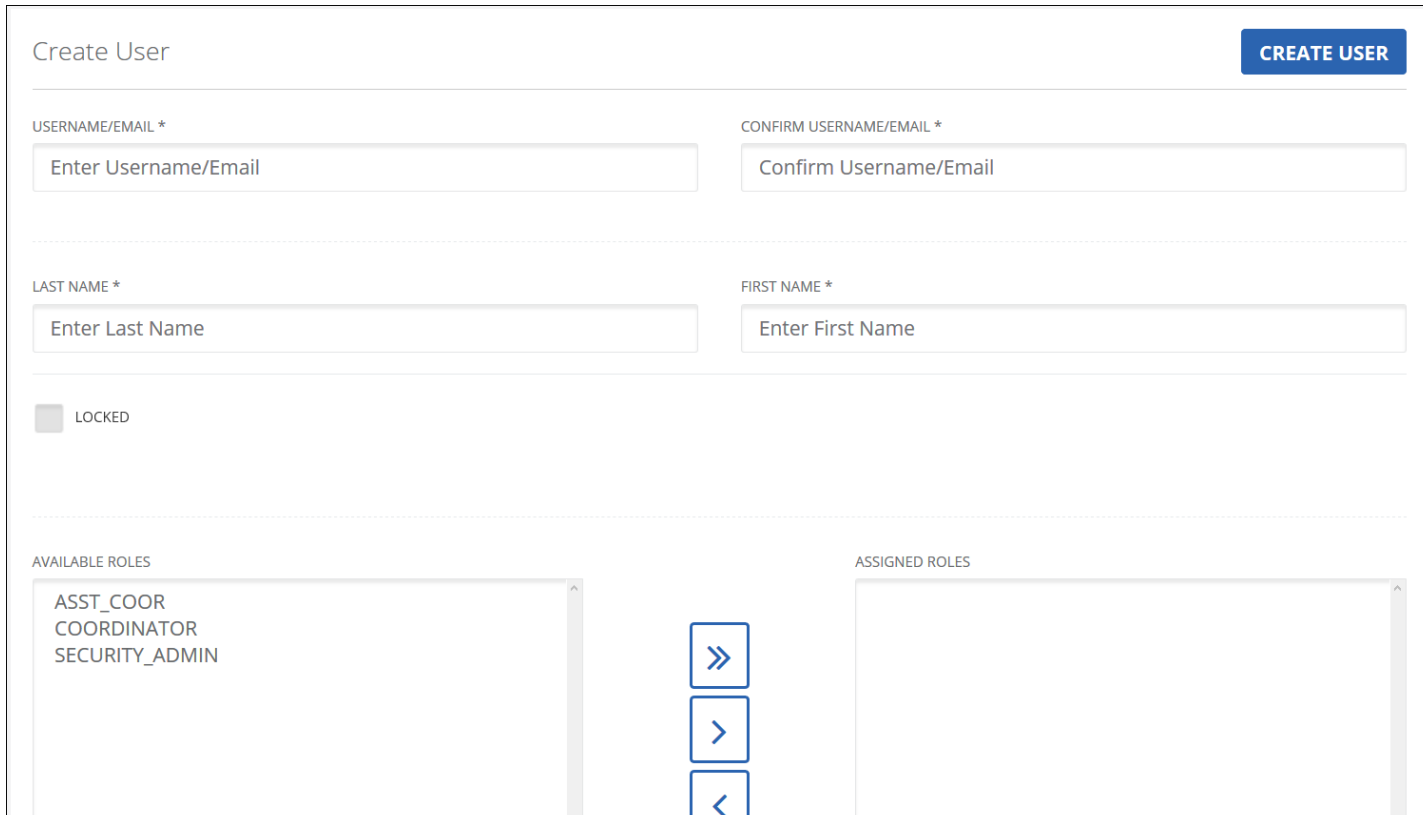
Username	Account Status	First Name	Last Name	Actions
USER1234	OPEN	John	Doe	



CREATE A NEW USER

CREATE A NEW USER

1. Click **SECURITY > MANAGE USERS**
2. Click **CREATE USER**. The *Create User* screen opens.

A screenshot of the 'Create User' web form. The form has a title 'Create User' at the top left and a blue 'CREATE USER' button at the top right. It contains several input fields: 'USERNAME/EMAIL *' and 'CONFIRM USERNAME/EMAIL *' (both with placeholder text 'Enter Username/Email'), 'LAST NAME *' (placeholder 'Enter Last Name'), and 'FIRST NAME *' (placeholder 'Enter First Name'). Below these is a 'LOCKED' checkbox. At the bottom, there are two scrollable lists: 'AVAILABLE ROLES' containing 'ASST_COOR', 'COORDINATOR', and 'SECURITY_ADMIN', and 'ASSIGNED ROLES' which is currently empty. Between these lists are three navigation buttons: a double right arrow '»', a single right arrow '>', and a single left arrow '<'.

Create User CREATE USER

USERNAME/EMAIL * CONFIRM USERNAME/EMAIL *

LAST NAME * FIRST NAME *

☐ LOCKED

AVAILABLE ROLES ASSIGNED ROLES

ASST_COOR
COORDINATOR
SECURITY_ADMIN

»
>
<

CREATE A NEW USER

2. Enter/Confirm the user's email address and their **LAST NAME** and **FIRST NAME**.

Create User

USERNAME/EMAIL *

CONFIRM USERNAME/EMAIL *

Enter Username/Email

Confirm Username/Email

LAST NAME *

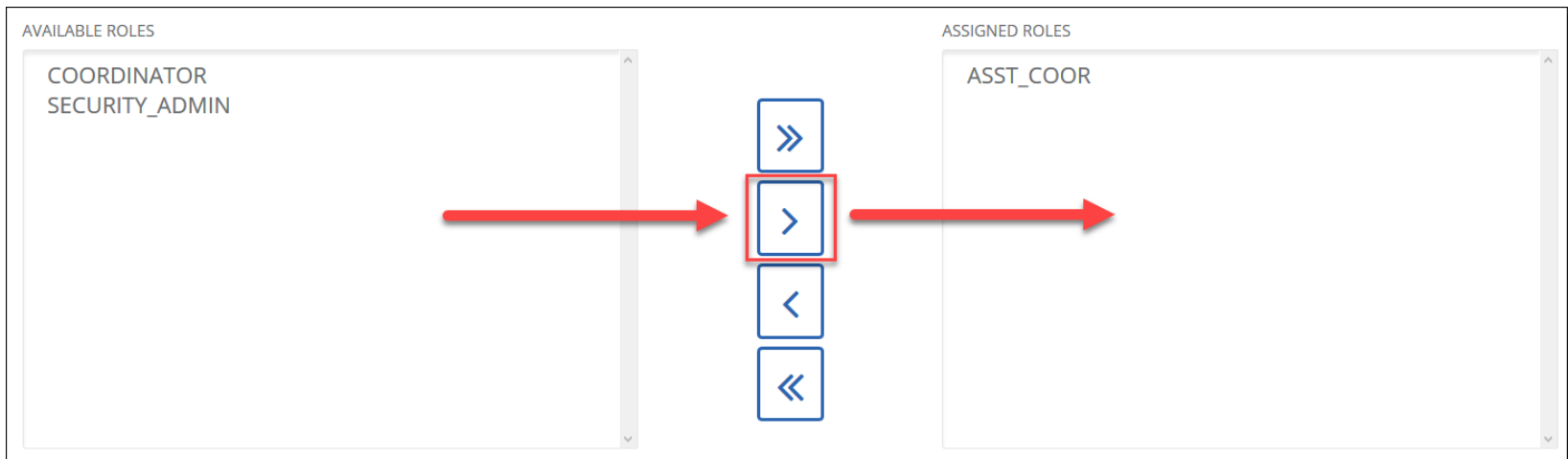
FIRST NAME *

Enter Last Name

Enter First Name

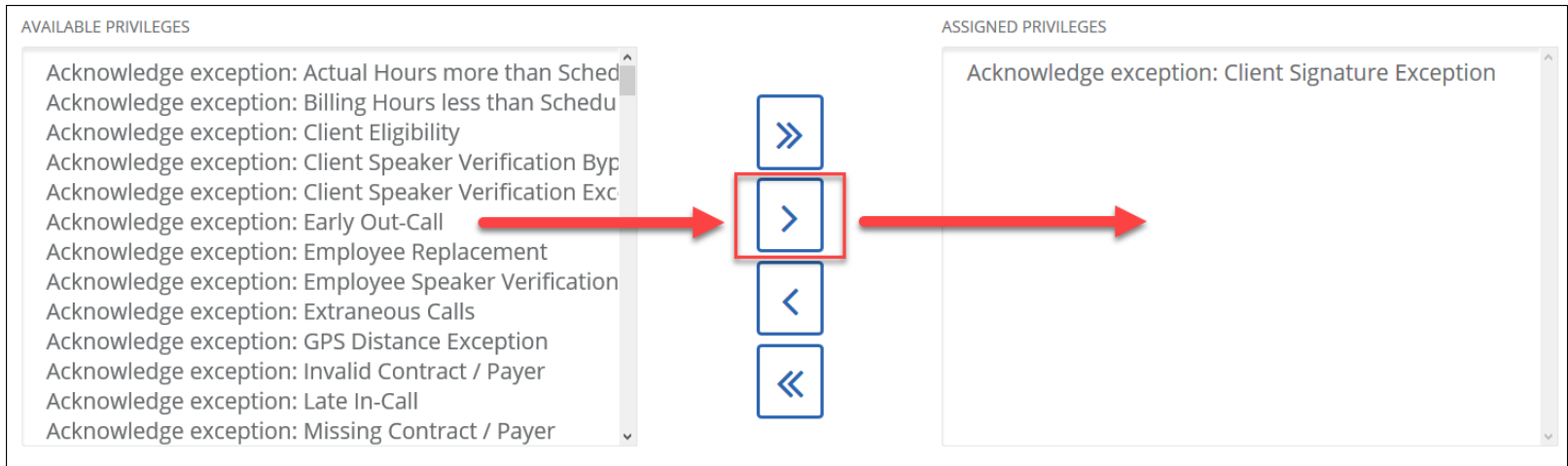
CREATE A NEW USER

3. Click the appropriate item in the **AVAILABLE ROLES** field and click the > button to move it into the **ASSIGNED ROLES** field. All user privileges assigned to the roles selected are granted to the user. Multiple roles can assigned to a user, as necessary



CREATE A NEW USER

- Click the appropriate item in the **AVAILABLE PRIVILEGES** field and click the > button to move it into the **ASSIGNED PRIVILEGES** field.

A screenshot of a user setup interface. On the left, under the heading 'AVAILABLE PRIVILEGES', is a scrollable list of privilege items. The item 'Acknowledge exception: Early Out-Call' is highlighted with a red box, and a red arrow points from it to a central column of four buttons. The middle button in this column is a single right-pointing chevron (>) and is also highlighted with a red box. A red arrow points from this button to the right, where a scrollable list under the heading 'ASSIGNED PRIVILEGES' contains the item 'Acknowledge exception: Client Signature Exception'.

AVAILABLE PRIVILEGES

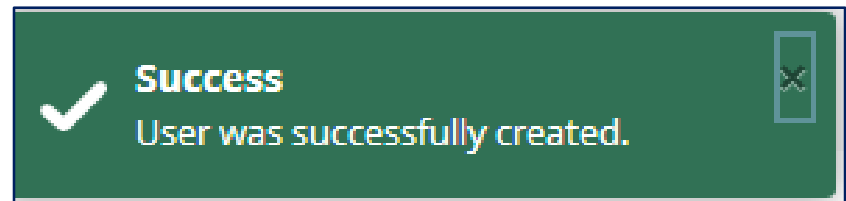
- Acknowledge exception: Actual Hours more than Sched
- Acknowledge exception: Billing Hours less than Schedu
- Acknowledge exception: Client Eligibility
- Acknowledge exception: Client Speaker Verification Byp
- Acknowledge exception: Client Speaker Verification Exc
- Acknowledge exception: Early Out-Call
- Acknowledge exception: Employee Replacement
- Acknowledge exception: Employee Speaker Verification
- Acknowledge exception: Extraneous Calls
- Acknowledge exception: GPS Distance Exception
- Acknowledge exception: Invalid Contract / Payer
- Acknowledge exception: Late In-Call
- Acknowledge exception: Missing Contract / Payer

ASSIGNED PRIVILEGES

- Acknowledge exception: Client Signature Exception

CREATE A NEW USER

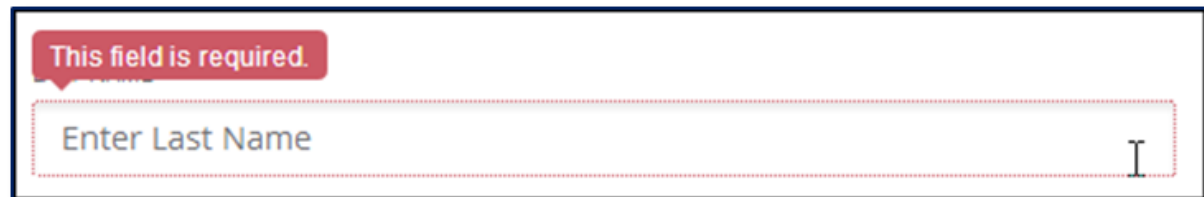
5. Click **CREATE USER**. A successful confirmation dialog displays.



If a user also provides care to a client, they must be added as an employee in Sandata EVV.

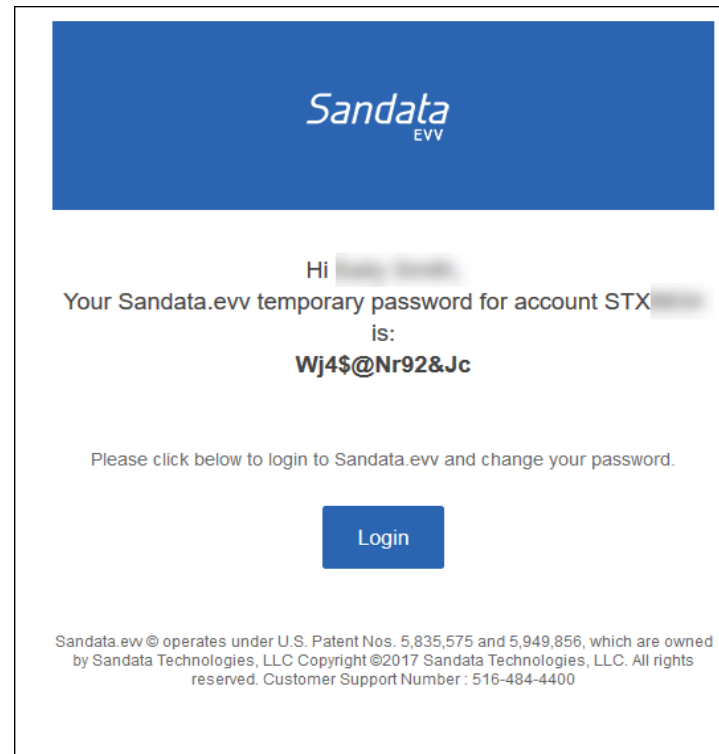


If any of the required fields are not filled out correctly or left blank, a tool tip message displays above the field to be completed.



CREATE A NEW USER


6. Sandata EVV will send a temporary password email to the email address entered during the user set up. The user can use the temporary password to login and set their permanent password.








MODIFY A USER

MODIFY A USER

1. Perform a user search.
2. Click Edit  in the **Actions** column on the right-hand side of the screen of the appropriate user. The *Modify User* screen opens.
3. Add/Remove any of the roles/privileges to modify the user account.
4. Click **MODIFY USER**. A successful confirmation message displays.


Username	Account Status	First Name	Last Name	Actions
[blurred]	OPEN	[blurred]	[blurred]	

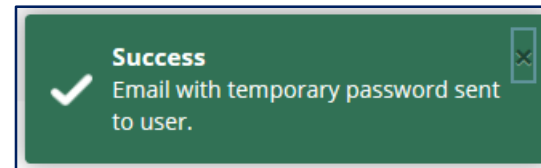
 **Success**
User was successfully modified. 



RESETTING A USER'S PASSWORD


RESETTING A USER'S PASSWORD

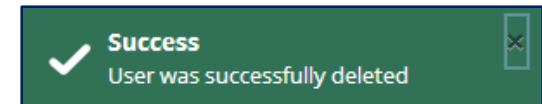
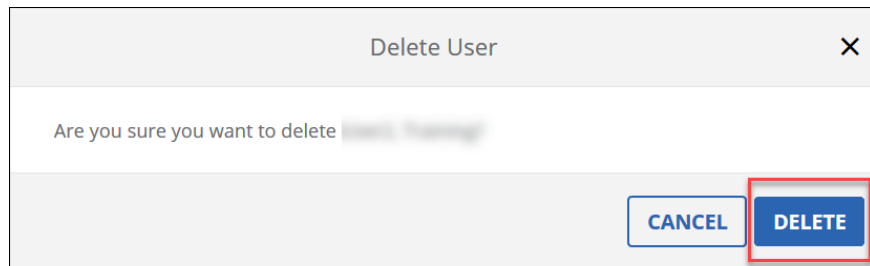
1. Perform a user search
2. Click Edit  in the **Actions** column on the right-hand side of the screen of the appropriate user. The *Modify User* screen opens.
3. Click **RESET PASSWORD**. A message displays indicating a temporary password has been sent to the user.



DELETING A USER

DELETING A USER

1. Perform a user search.
2. Click **DELETE**  in the Actions column on the right-hand side of the screen of the appropriate user. The Delete User confirmation box displays.
3. Click **Delete**.



Remember that deleting does not remove the user from Sandata EVV, but inactivates the record.



MANAGE USER ROLES

MANAGE USER ROLES

- ◆ The use of roles allows Administrators to tailor a set of system functions for each job title in the organization to make maintenance of user access easier.
- ◆ Whenever a role is edited, it affects all users who have been assigned to that role.

Sandata EVV includes a standard set of roles across all agencies. The roles are:

Default Role	Description
ASST_COOR (Assistant Coordinator)	Sandata EVV generalist that supports visit verification and visit reporting.
COORDINATOR	Intake/manage clients, intake/manage employees.
SECURITY_ADMIN	Agency set up, create and manage all EVV users.



CREATING NEW USER ROLE

1. Click **SECURITY > MANAGE USER ROLES**. The *Manage User Roles* screen displays.







Manage User Roles

CREATE USER ROLE

Show: 10 per page

« < 1 > »

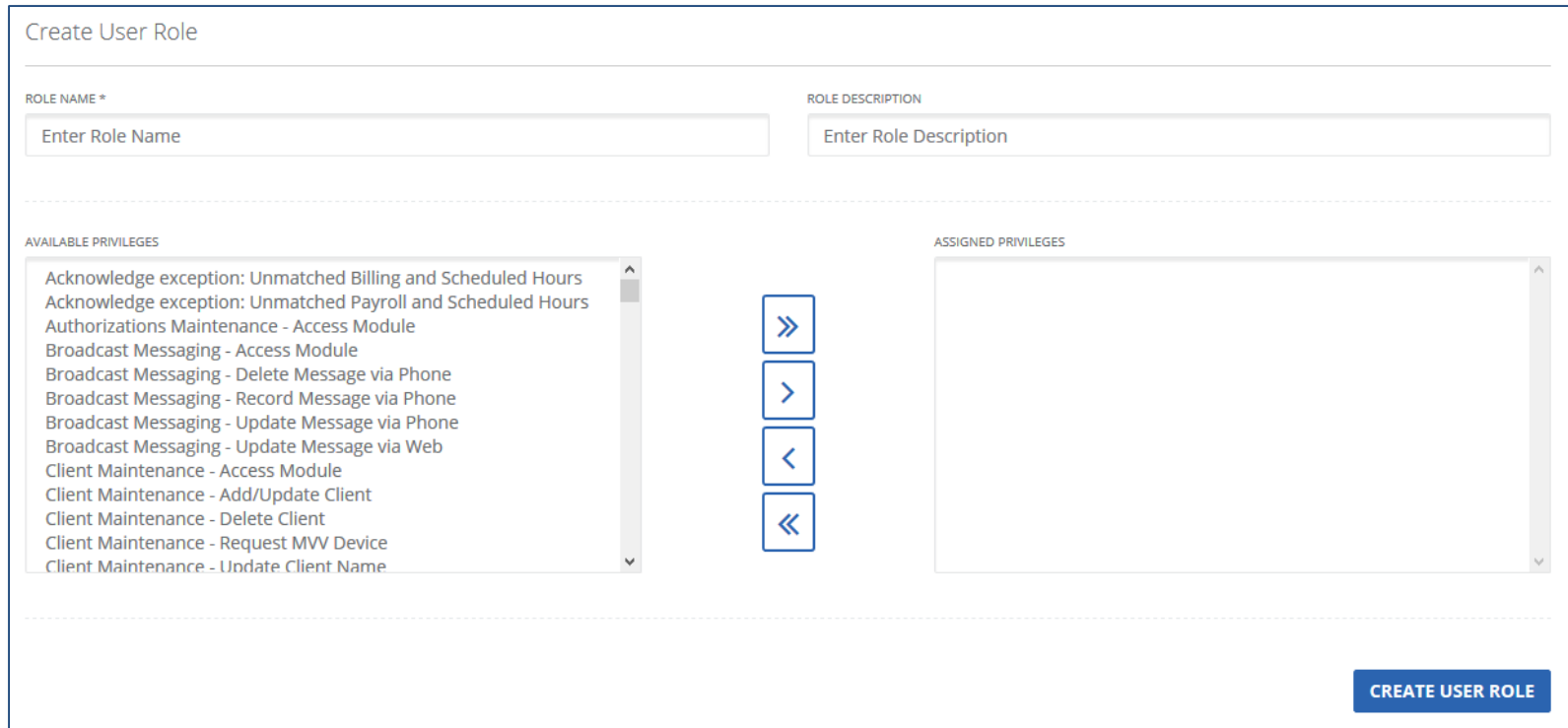
Showing 1 to 3 of 3 entries

Role Name	Role Description	Actions
ASST_COOR	Supports the coordinator	 
COORDINATOR	Administrative generalist supporting various Santrax activities	 
SECURITY_ADMIN	Manage and administer the Santrax System	 

« < 1 > »

Showing 1 to 3 of 3 entries

2. Click **CREATE USER ROLE**. The *Create User Role* screen opens.

A screenshot of the 'Create User Role' web application interface. The form is titled 'Create User Role' at the top left. It contains two input fields: 'ROLE NAME *' with a placeholder 'Enter Role Name' and 'ROLE DESCRIPTION' with a placeholder 'Enter Role Description'. Below these fields is a section for selecting privileges. On the left, under the heading 'AVAILABLE PRIVILEGES', is a scrollable list of 14 privilege names. In the center, there are four blue square buttons with white symbols: a double right arrow, a single right arrow, a single left arrow, and a double left arrow. On the right, under the heading 'ASSIGNED PRIVILEGES', is an empty scrollable box. At the bottom right of the form is a blue button with the text 'CREATE USER ROLE' in white.

Create User Role

ROLE NAME *

Enter Role Name

ROLE DESCRIPTION

Enter Role Description

AVAILABLE PRIVILEGES

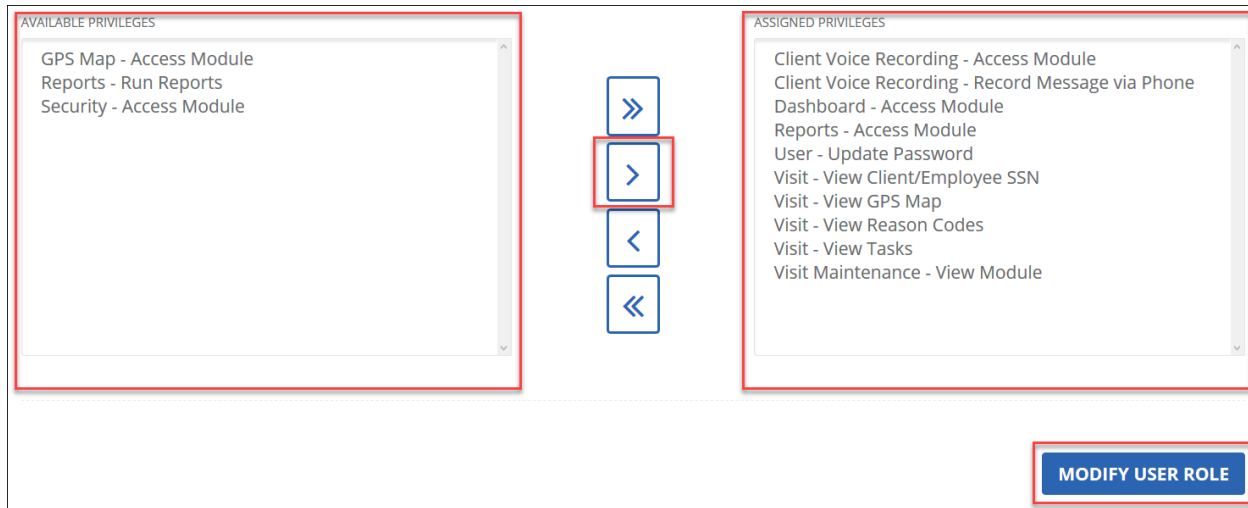
- Acknowledge exception: Unmatched Billing and Scheduled Hours
- Acknowledge exception: Unmatched Payroll and Scheduled Hours
- Authorizations Maintenance - Access Module
- Broadcast Messaging - Access Module
- Broadcast Messaging - Delete Message via Phone
- Broadcast Messaging - Record Message via Phone
- Broadcast Messaging - Update Message via Phone
- Broadcast Messaging - Update Message via Web
- Client Maintenance - Access Module
- Client Maintenance - Add/Update Client
- Client Maintenance - Delete Client
- Client Maintenance - Request MVV Device
- Client Maintenance - Update Client Name

ASSIGNED PRIVILEGES

CREATE USER ROLE

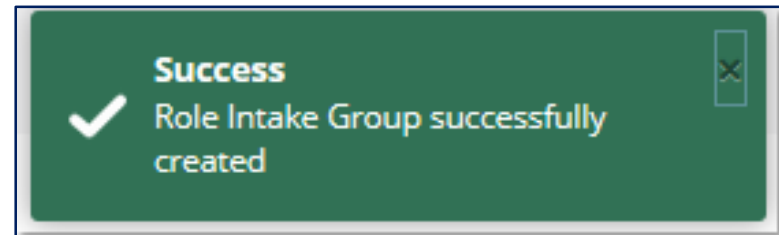
CREATING NEW USER ROLE

3. Enter the name for the new role in the **ROLE NAME** field.
4. Enter a brief description in the **ROLE DESCRIPTION** field.
5. Select the privilege(s) to be assigned to the new role in the **AVAILABLE PRIVILEGES** field.

The screenshot shows a web interface for creating a new user role. It features two main panels: 'AVAILABLE PRIVILEGES' on the left and 'ASSIGNED PRIVILEGES' on the right. The 'AVAILABLE PRIVILEGES' panel contains a list of privileges: 'GPS Map - Access Module', 'Reports - Run Reports', and 'Security - Access Module'. The 'ASSIGNED PRIVILEGES' panel contains a list of privileges: 'Client Voice Recording - Access Module', 'Client Voice Recording - Record Message via Phone', 'Dashboard - Access Module', 'Reports - Access Module', 'User - Update Password', 'Visit - View Client/Employee SSN', 'Visit - View GPS Map', 'Visit - View Reason Codes', 'Visit - View Tasks', and 'Visit Maintenance - View Module'. Between the two panels are four buttons: a double right arrow (»), a single right arrow (>), a single left arrow (<), and a double left arrow («). The single right arrow button is highlighted with a red box. At the bottom right of the interface is a blue button labeled 'MODIFY USER ROLE'.


CREATING NEW USER ROLE

6. Click **CREATE USER ROLE**. A successful confirmation message displays.



DELETING ROLES

DELETING ROLES

1. Scroll through the list of roles and find the role to be deleted
2. Click **DELETE**  in the Actions column on the right-hand side of the screen of the appropriate role.







Manage User Roles

CREATE USER ROLE

Show: 10 per page

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Showing 1 to 3 of 3 entries

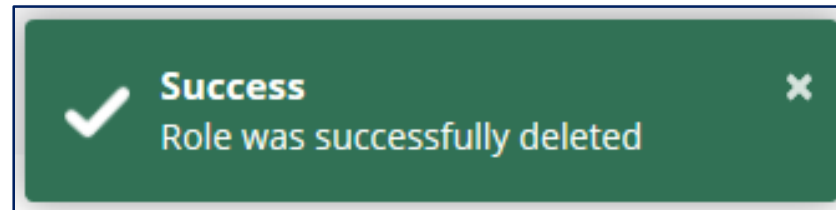
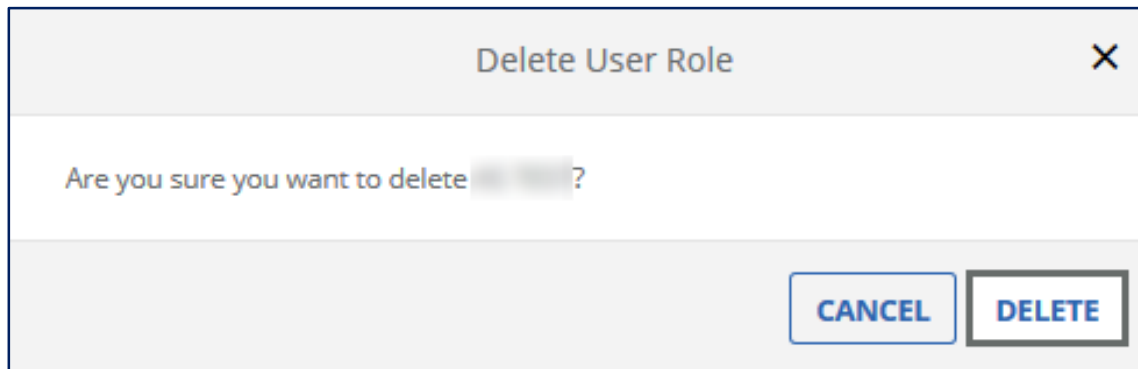
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COORDINATOR	Administrative generalist supporting various Santrax activities	 
SECURITY_ADMIN	Manage and administer the Santrax System	 

« < 1 > »

Showing 1 to 3 of 3 entries

DELETING ROLES

3. The *Delete User Role* confirmation message displays.
4. Click **DELETE**. A successful confirmation message displays.

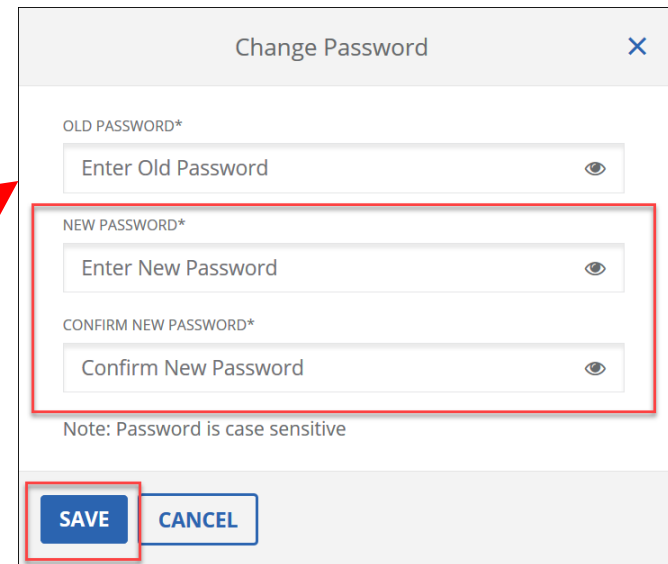
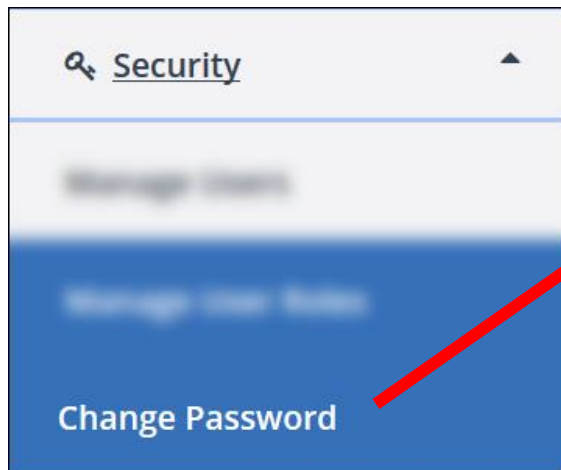




RESETTING YOUR OWN PASSWORD

RESETTING YOUR OWN PASSWORD

1. Click **Change Password** from the main **Security** menu. The Change Password panel opens.
2. Enter your current password in the **OLD PASSWORD** field.
3. Enter your new password in the **NEW PASSWORD** field; type it again in the **CONFIRM NEW PASSWORD** field.
4. Click **SAVE**.

A screenshot of the 'Change Password' dialog box. The dialog has a title bar with the text 'Change Password' and a close button (X). Inside, there are three password input fields: 'OLD PASSWORD*' with the placeholder 'Enter Old Password', 'NEW PASSWORD*' with the placeholder 'Enter New Password', and 'CONFIRM NEW PASSWORD*' with the placeholder 'Confirm New Password'. Each field has an eye icon for toggling visibility. A red rectangle highlights the 'NEW PASSWORD' and 'CONFIRM NEW PASSWORD' fields. Below the fields is a note: 'Note: Password is case sensitive'. At the bottom, there are two buttons: 'SAVE' and 'CANCEL'. The 'SAVE' button is highlighted with a red rectangle.

QUESTIONS...

